

# SAMII HR 2.3.2 Upgrade and Fixes

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## Overview

September 16, 2002



# Agenda

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- Overview
- 2.3.2 Upgrade Summary
- HR APRs
- HR Data Warehouse Changes
- Questions?
- SAMII Web Site - Review Check lists
- Payroll Accounting Changes

# Version and Build Date



**SAM II**  
*Statewide Advantage for Missouri*

**Desktop Sign-on**

User ID	<input type="text"/>
Password	<input type="password"/>

OK Cancel

Enter user id and password.

ADVANTAGE 2000®

Copyright 1991-1996  
American Management Systems, Inc.  
All rights reserved.

**Version 2.3.2    Build Date 09/30/02**



# Error Message

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ADVANTAGE Front-end Security

ADVANTAGE HR

User ID

Password

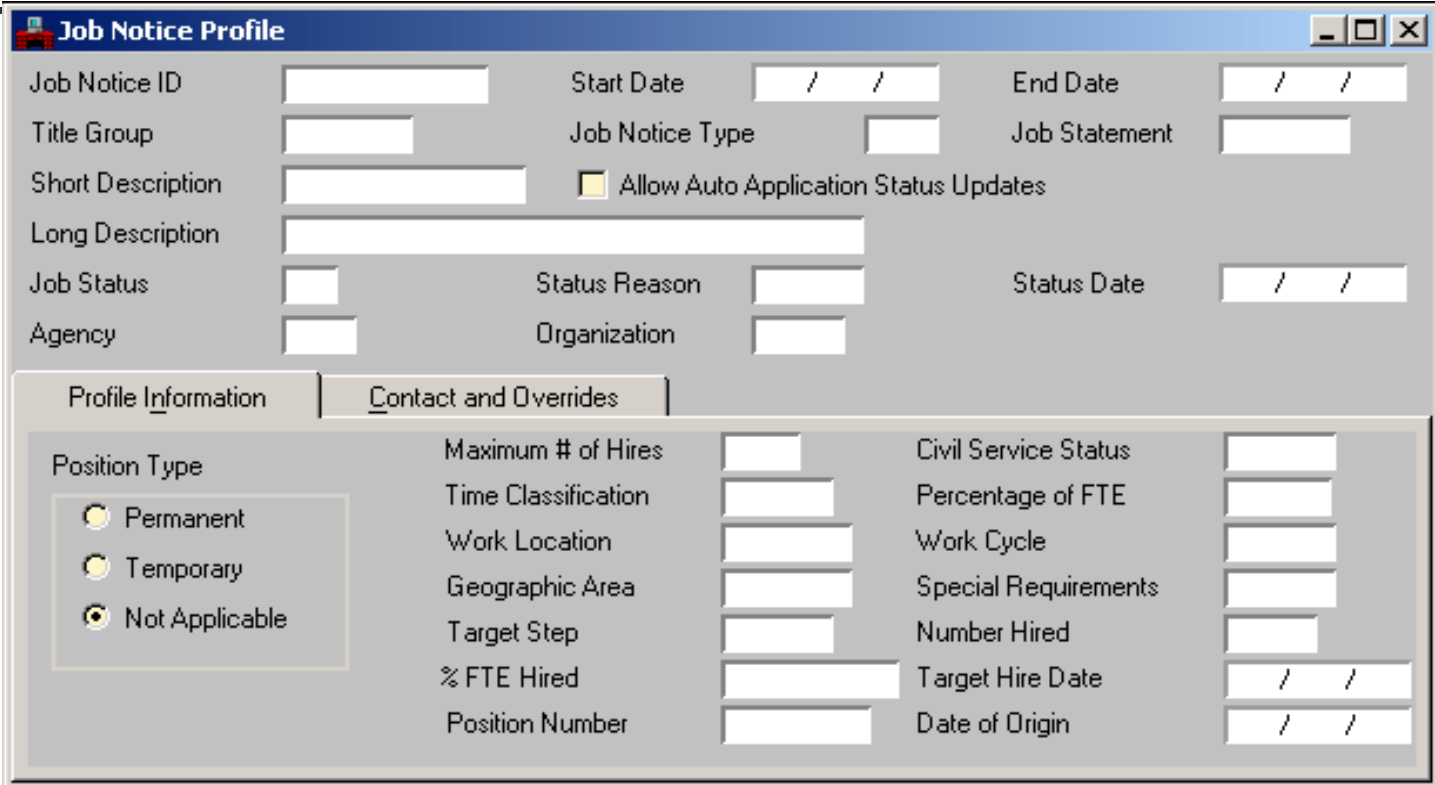
Front-end logon failed. Re-enter password.

## 2.3.2 Upgrade Summary

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# JNOT



The image shows a software window titled "Job Notice Profile". It contains a form with various fields for job notice information. The form is divided into two tabs: "Profile Information" and "Contact and Overrides". The "Profile Information" tab is currently selected. The fields are organized as follows:

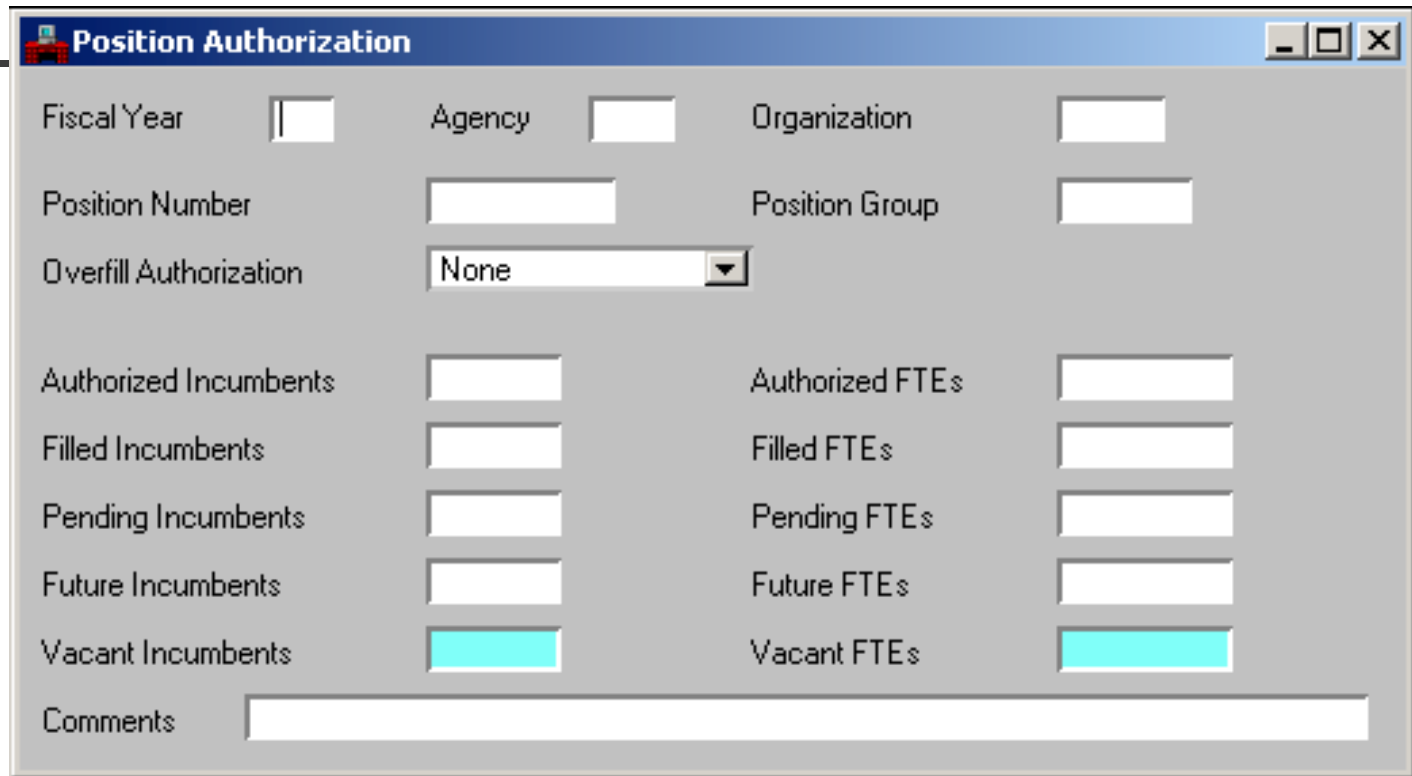
Field	Field	Field	Field
Job Notice ID	Start Date	End Date	
Title Group	Job Notice Type	Job Statement	
Short Description	<input type="checkbox"/> Allow Auto Application Status Updates		
Long Description			
Job Status	Status Reason	Status Date	
Agency	Organization		

Profile Information		Contact and Overrides	
Position Type <input type="radio"/> Permanent <input type="radio"/> Temporary <input checked="" type="radio"/> Not Applicable	Maximum # of Hires		Civil Service Status
	Time Classification		Percentage of FTE
	Work Location		Work Cycle
	Geographic Area		Special Requirements
	Target Step		Number Hired
	% FTE Hired		Target Hire Date
	Position Number		Date of Origin

Added 2 new fields: % FTE Hired and Number Hired

# PAMT



The image shows a software window titled "Position Authorization". It contains several input fields and a dropdown menu. The fields are arranged in a grid-like fashion. The "Overfill Authorization" field is a dropdown menu currently set to "None". The "Vacant Incumbents" and "Vacant FTEs" fields are highlighted in cyan. The "Comments" field is a large text area at the bottom.

Field	Value
Fiscal Year	
Agency	
Organization	
Position Number	
Position Group	
Overfill Authorization	None
Authorized Incumbents	
Authorized FTEs	
Filled Incumbents	
Filled FTEs	
Pending Incumbents	
Pending FTEs	
Future Incumbents	
Future FTEs	
Vacant Incumbents	
Vacant FTEs	
Comments	

New fields: Position Group, Pending Incumbents, Pending FTEs, Future Incumbents, Future FTEs

Change: Display only one position at a time

# PEDT

**Personnel Edit Rules**

Personnel Action  Personnel Action Reason  Pedt Group

Effective Date  /  /  Expiration Date  /  /

Requirement Edits | Consistency Edits | Date Requirement Edits | Date Consistency Edits

	Required	Not Allowed	Baseline	In List
Middle Name	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Prefix	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Suffix	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Civil Service Status	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Permanent / Temporary	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Time Class	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Sub-title	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Override Grade	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Step	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Override Pay Policy	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>

Messages 2:13 PM 09/06/02





## PEDT continued

Override Leave Policy	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Override Deduction Policy	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Override FLSA Exemption	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Override FLSA Profile	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Position Number	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Organization	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Union Local	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Union Member	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Alternate ID	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	

[In List](#)

<input type="checkbox"/> EEO Full-time	<input type="checkbox"/> Payroll Number	<input type="checkbox"/> Pay Class	<input type="checkbox"/> Title
<input type="checkbox"/> Table Driven Pay	<input type="checkbox"/> Agency	<input type="checkbox"/> Percent Full-time	

In List section has been added.

# PEDT continued

**Personnel Edit Rules**

Personnel Action  Personnel Action Reason  Pedt Group

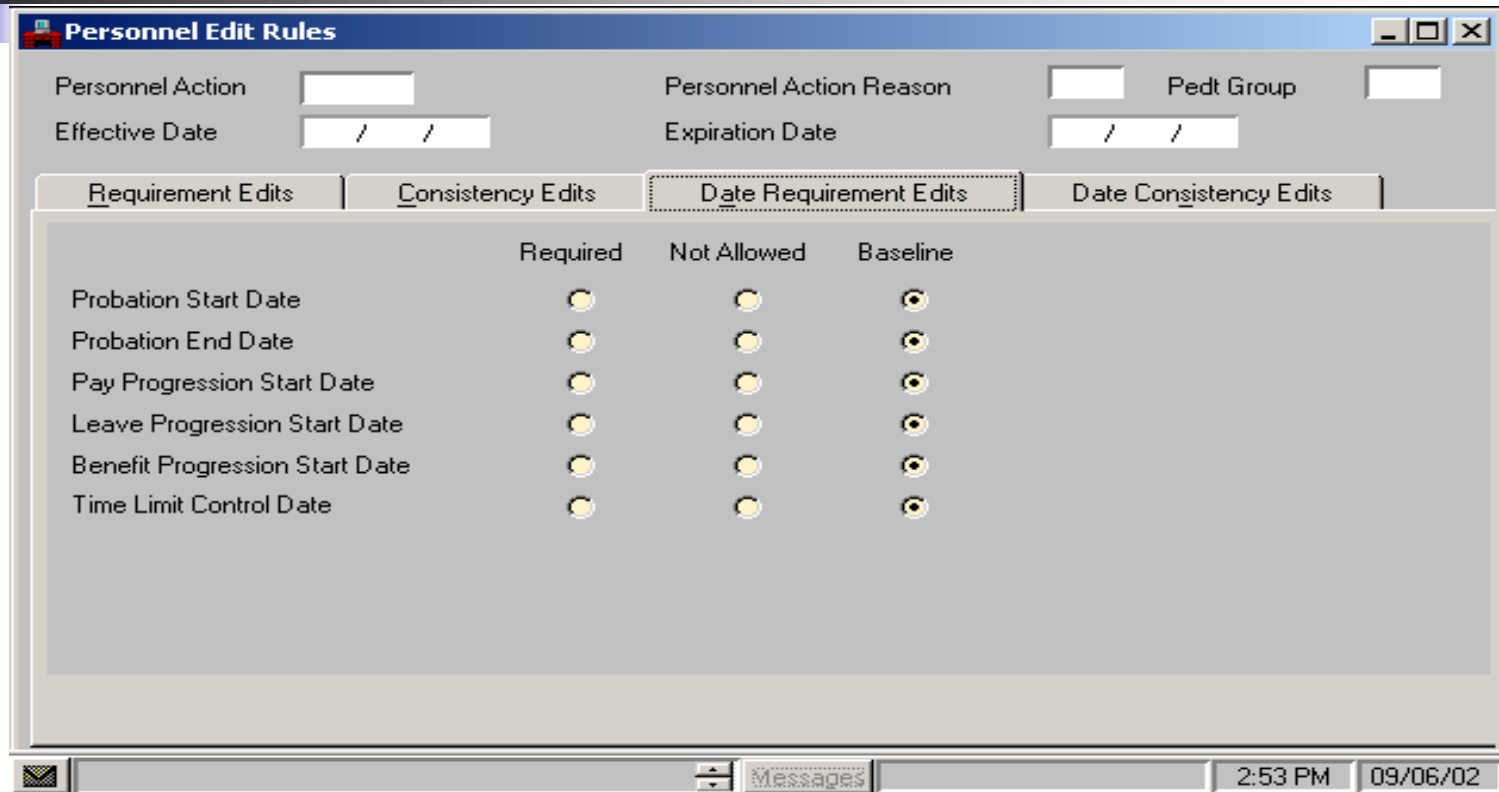
Effective Date  /  /  Expiration Date  /  /

Requirement Edits Consistency Edits Date Requirement Edits Date Consistency Edits

	Same	Change	Baseline		Same	Change	Baseline
EEO Full-time	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Override Pay Policy	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Last Personnel Action	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Override Leave Policy	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Last Persnl Action Reason	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Override Deduction Policy	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Civil Service Status	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Override FLSA Exemption	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Permanent / Temporary	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Override FLSA Profile	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Time Class	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Position Number	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Payroll Number	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Agency	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pay Class	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Organization	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Title	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Union Local	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Sub-title	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Union Member	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Override Grade	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Percent Full-time	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Step	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Table Driven Pay Rate	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Job Status	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>				

Messages 2:17 PM 09/06/02

## PEDT continued



The image shows a Windows-style dialog box titled "Personnel Edit Rules". It contains several input fields for "Personnel Action", "Personnel Action Reason", "Pedt Group", "Effective Date", and "Expiration Date". Below these are four tabs: "Requirement Edits", "Consistency Edits", "Date Requirement Edits" (which is selected), and "Date Consistency Edits". The selected tab displays a table with three columns: "Required", "Not Allowed", and "Baseline". Each row in the table represents a different date field, and each column contains a radio button. In the "Baseline" column, all radio buttons are selected. At the bottom of the dialog, there is a status bar with a "Messages" button, the time "2:53 PM", and the date "09/06/02".

	Required	Not Allowed	Baseline
Probation Start Date	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Probation End Date	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pay Progression Start Date	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Leave Progression Start Date	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Benefit Progression Start Date	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Time Limit Control Date	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>


## PEDT continued

**Personnel Edit Rules**

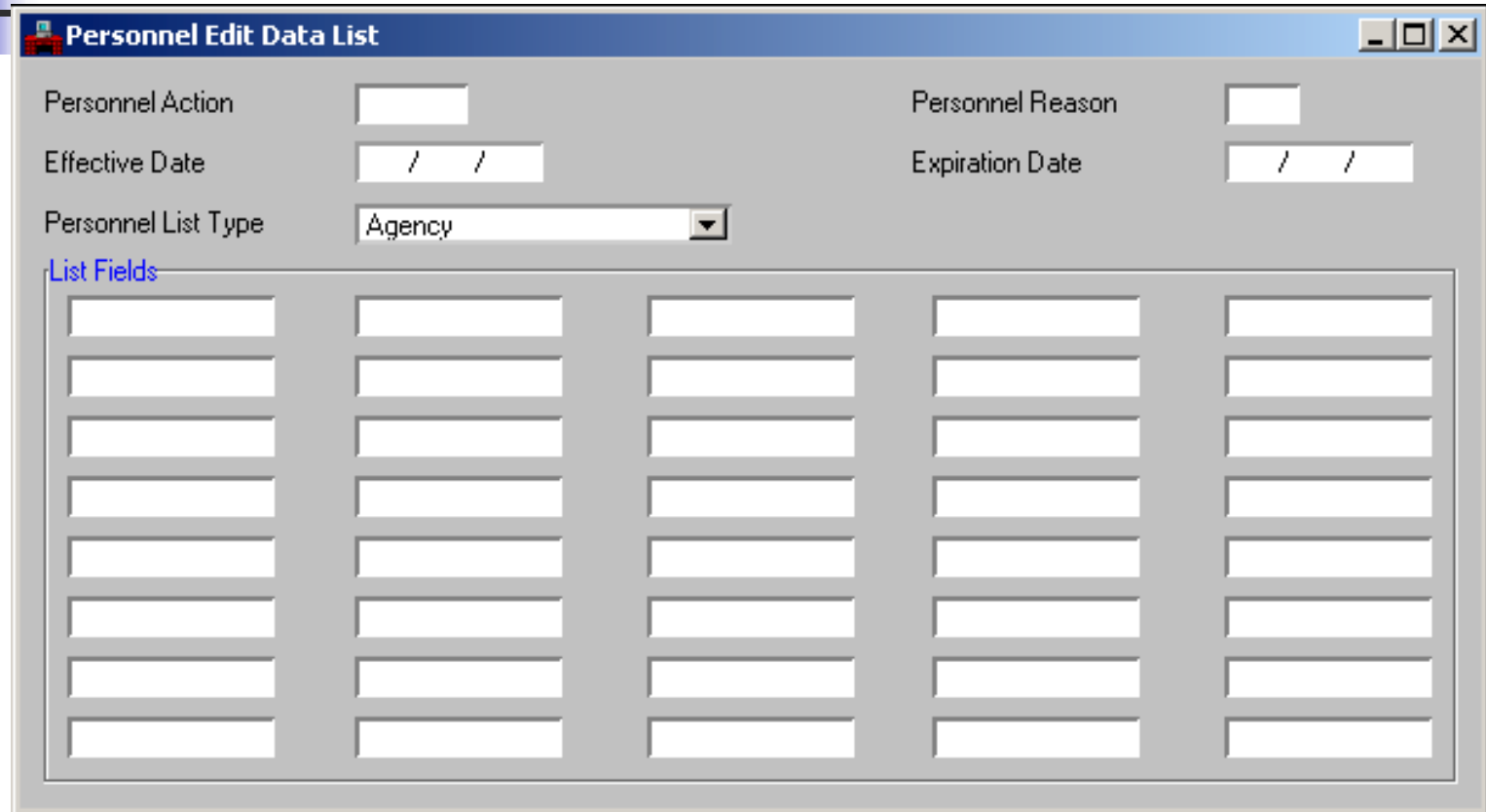
Personnel Action  Personnel Action Reason  Pedt Group   
Effective Date  /  /  Expiration Date  /  /

Requirement Edits | Consistency Edits | Date Requirement Edits | Date Consistency Edits

	Same	Change	Earlier	Later	Baseline
Original Appointment Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Probation Start Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Probation End Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pay Progression Start Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Leave Progression Start Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Benefit Progression Start Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Time Limit Control Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

 Messages 2:53 PM 09/06/02

# PEDL



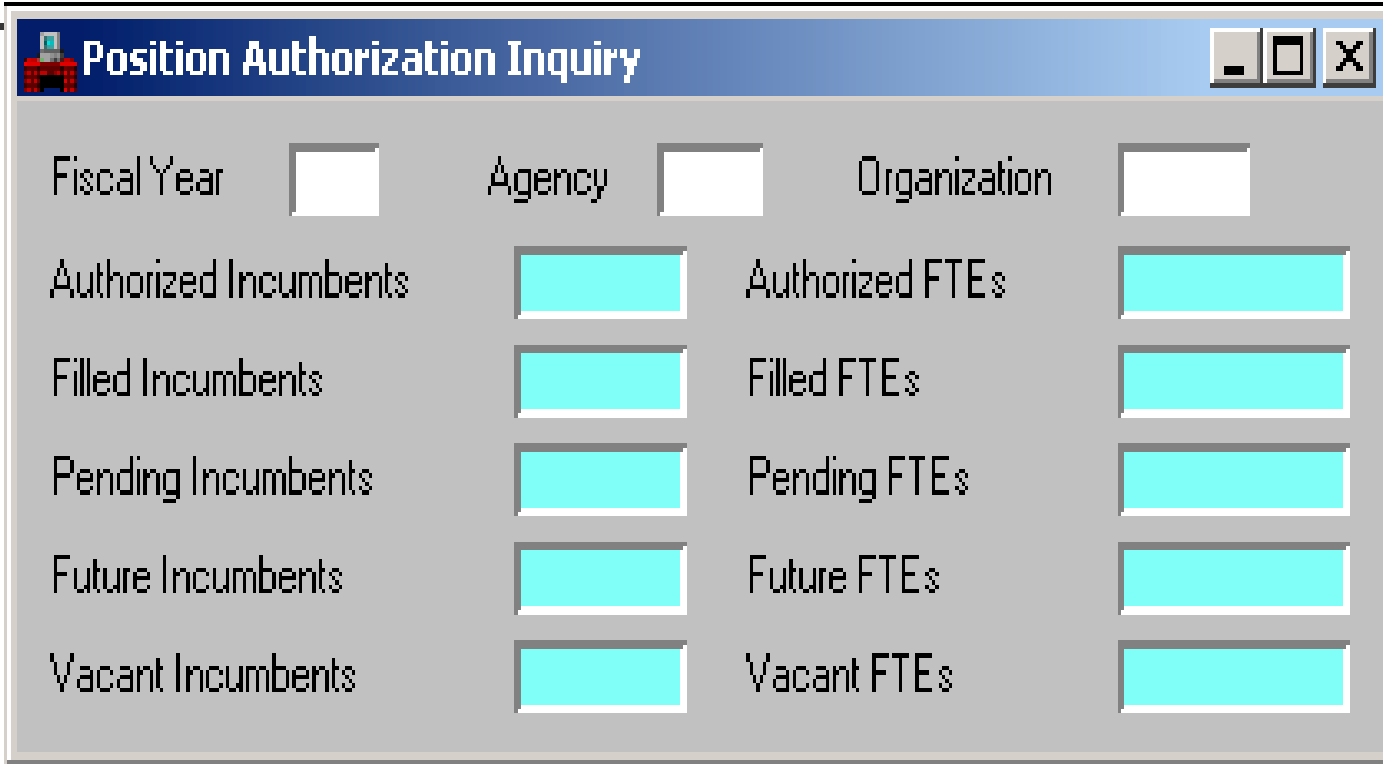
The image shows a software window titled "Personnel Edit Data List". It features a header bar with a small icon and standard window controls. Below the header, there are four input fields: "Personnel Action" (text box), "Personnel Reason" (text box), "Effective Date" (date picker with slashes), and "Expiration Date" (date picker with slashes). Below these is a "Personnel List Type" dropdown menu currently set to "Agency". A blue link labeled "List Fields" is positioned above a table with five columns and eight rows of empty text boxes.

Personnel Action	Personnel Reason	Effective Date	Expiration Date	Personnel List Type
		/ /	/ /	Agency

New Window



# QPAT



The screenshot shows a software window titled "Position Authorization Inquiry". It features a header bar with a small icon of a computer and window control buttons (minimize, maximize, close). The main area contains a form with the following fields:

Fiscal Year	Agency	Organization
<input type="text"/>	<input type="text"/>	<input type="text"/>
Authorized Incumbents	<input type="text"/>	Authorized FTEs
Filled Incumbents	<input type="text"/>	Filled FTEs
Pending Incumbents	<input type="text"/>	Pending FTEs
Future Incumbents	<input type="text"/>	Future FTEs
Vacant Incumbents	<input type="text"/>	Vacant FTEs

New fields: Pending Incumbents, Pending FTEs, Future Incumbents, Future FTEs



# QPTL

**Position by Title Inquiry**

Agency  Organization  Selection Date  /  /

Authorized FTE  Encumbered FTE

Authorized Incumbents  Encumbered Incumbents

Appointment Allowed  
☐ Yes ☐ No ☒ N / A

Recruitment Allowed  
☐ Yes ☐ No ☒ N / A

	Title	Sub-title	Position Number	Short Description	Status	Authorized Incumbents	Authorized FTE	Encumbered Incumbents
1	<input type="text"/>							
2								
3								
4								
5								
6								
7								
8								
9								
10								

Changed field names from Filled Incumbents and Filled FTEs to Encumbered Incumbents and Encumbered FTEs

## QPTL continued

**Position by Title Inquiry**

Agency  Organization  Selection Date  /  /

Authorized FTE  Encumbered FTE

Authorized Incumbents  Encumbered Incumbents

Appointment Allowed  
☐ Yes ☐ No ☒ N / A

Recruitment Allowed  
☐ Yes ☐ No ☒ N / A

	Status	Authorized Incumbents	Authorized FTE	Encumbered Incumbents	Encumbered FTE	Overfill Authorization
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						



# QPSR

**Position Roster**

Agency  Organization  Position Number

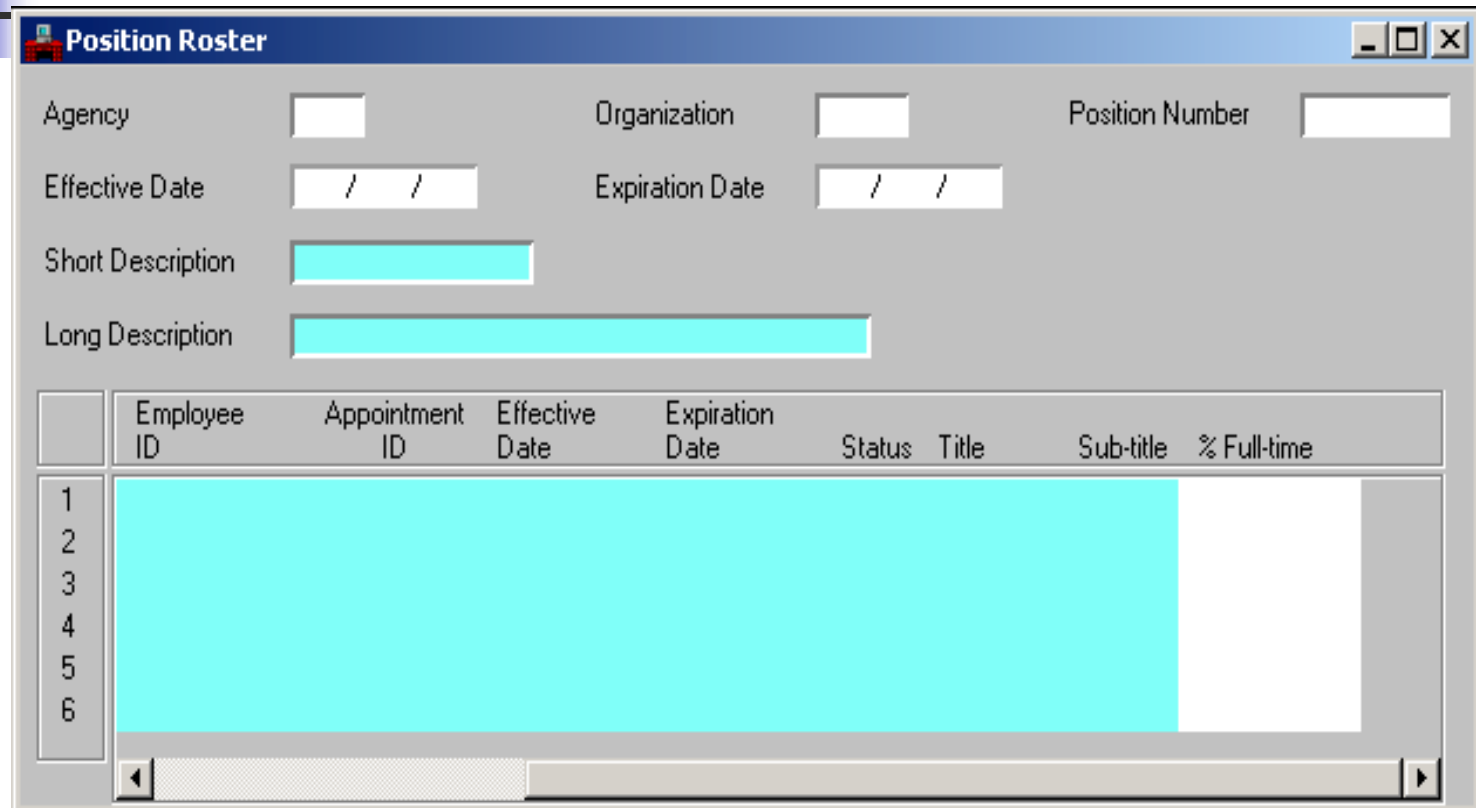
Effective Date  /  /  Expiration Date  /  /

Short Description

Long Description

	Employee Name	Employee ID	Appointment ID	Effective Date	Expiration Date	S
1	<input type="text"/>					
2						
3						
4						
5						
6						

## QPSR continued

A screenshot of a software window titled "Position Roster". The window has a blue title bar with standard minimize, maximize, and close buttons. Below the title bar, there are several input fields: "Agency", "Organization", and "Position Number" are text boxes; "Effective Date" and "Expiration Date" are date pickers showing slashes for day, month, and year; "Short Description" and "Long Description" are multi-line text areas. At the bottom, there is a table with a scrollable area. The table has a header row with columns: "Employee ID", "Appointment ID", "Effective Date", "Expiration Date", "Status", "Title", "Sub-title", and "% Full-time". The table body is currently empty, with a light blue background. A vertical scrollbar is on the left side of the table, and a horizontal scrollbar is at the bottom.

	Employee ID	Appointment ID	Effective Date	Expiration Date	Status	Title	Sub-title	% Full-time
1								
2								
3								
4								
5								
6								

New field: % Full-time



# HR Applied APRs

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- What does APR stand for?



# HR Applied APRs

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- APPLICATION PROBLEM RESOLUTION

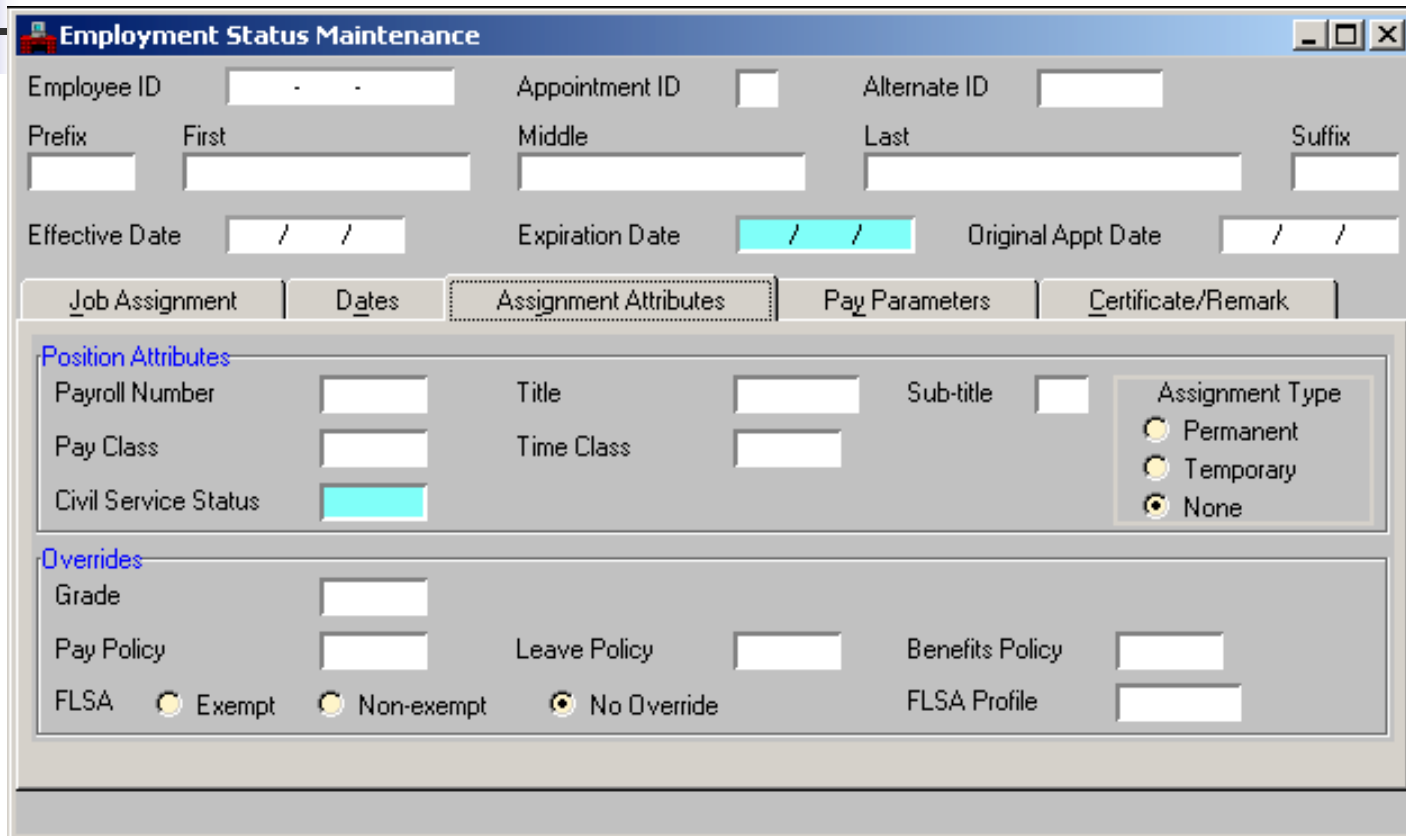


# HR Applied APRs

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- Hot keys - The ESMT window did not correctly bring up the Assignment Attributes panel when using Alt I

# ESMT



The image shows a screenshot of a software window titled "Employment Status Maintenance". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar, there are several input fields for employee information. The "Employee ID" field contains "- -". The "Appointment ID" field is empty. The "Alternate ID" field is empty. Below these, there are fields for "Prefix", "First", "Middle", "Last", and "Suffix", all of which are empty. Further down, there are date fields for "Effective Date", "Expiration Date", and "Original Appt Date". The "Expiration Date" field is highlighted in cyan. Below the date fields, there are five tabs: "Job Assignment", "Dates", "Assignment Attributes", "Pay Parameters", and "Certificate/Remark". The "Assignment Attributes" tab is currently selected. Under this tab, there are two sections: "Position Attributes" and "Overrides". The "Position Attributes" section includes fields for "Payroll Number", "Title", "Sub-title", "Pay Class", "Time Class", and "Civil Service Status". The "Civil Service Status" field is highlighted in cyan. To the right of these fields is a group box labeled "Assignment Type" containing three radio buttons: "Permanent", "Temporary", and "None". The "Overrides" section includes fields for "Grade", "Pay Policy", "Leave Policy", "Benefits Policy", "FLSA", and "FLSA Profile". The "FLSA" field has three radio buttons: "Exempt", "Non-exempt", and "No Override". The "No Override" radio button is selected. The "FLSA Profile" field is empty.

Employment Status Maintenance					
Employee ID	- -	Appointment ID		Alternate ID	
Prefix		First		Middle	
				Last	
				Suffix	
Effective Date	/ /	Expiration Date	/ /	Original Appt Date	/ /
<b>Job Assignment   Dates   Assignment Attributes   Pay Parameters   Certificate/Remark</b>					
<b>Position Attributes</b>					
Payroll Number		Title		Sub-title	
Pay Class		Time Class		<b>Assignment Type</b>	
Civil Service Status		<input type="radio"/> Permanent			
		<input type="radio"/> Temporary			
		<input checked="" type="radio"/> None			
<b>Overrides</b>					
Grade					
Pay Policy		Leave Policy		Benefits Policy	
FLSA	<input type="radio"/> Exempt	<input type="radio"/> Non-exempt	<input checked="" type="radio"/> No Override	FLSA Profile	



# HR Applied APRs

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- The QPSR window was not displaying correctly if there were more than 6 employees associated with the position

# QPSR

**Position Roster**

Agency  Organization  Position Number

Effective Date  /  /  Expiration Date  /  /

Short Description

Long Description

	Employee Name	Employee ID	Appointment ID	Effective Date	Expiration Date	S
1						
2						
3						
4						
5						
6						





# SAMII HR Data Warehouse Changes

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# HR DW Changes

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- The following HR Data Warehouse tables will have fields added and/or changed:
  - EXT\_PAY\_DETAIL
    - POSN\_NUM
  - BKG\_JNOT
    - PCT\_FULLTIME\_HIRED



# DW Changes Cont.

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- BKG\_PSAT
  - Changed AUTH\_FTE from 2 decimal places to 4
  - Added:
    - PEND\_INCUMBENTS
    - PEND\_FTE
    - FUTURE\_INCUMBENTS
    - FUTURE\_FTE
    - POSN\_GRP\_CD



# DW Changes Cont.

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- SNAP\_EMPLOYEE
  - Changed AUTH\_FTE from S9(7)v9(2) to S9(5)V9(4)
  - Added:
    - PEND\_INCUMBENTS
    - PEND\_FTE
    - FUTURE\_INCUMBENTS
    - FUTURE\_FTE
    - REF\_ID\_2



# DW Changes Cont.

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- SNAP\_POSITION
  - Changed AUTH\_FTE from S9(7)V9(2) to S9(5)V9(4)
  - Added:
    - PEND\_INCUMBENTS
    - PEND\_FTE
    - FUTURE\_INCUMBENTS
    - FUTURE\_FTE



## DW Changes Cont.

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- The following new tables will be available in the HR Data Warehouse:
  - REF\_PEDT (Personnel Edit Rules Reference Table)
  - REF\_PEDL (Personnel Edit Data List Table)



Questions??????

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# SAM II Website

## Path to the Check Lists

Missouri State Government Home Page - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media History Mail Print Edit

Address <http://www.state.mo.us/mo/index.htm> Go Links

- Show me -  
**MISSOURI**  
your online access to state government services

Home | E-mail | Telephone | Help | Jobs

Search Missouri  go  
Advanced Search

Living • Traveling • Learning • Working • Business • News • Government

Thur, 12 Sept 2002

- ▶ Boards and Commissions
- ▶ Code of State Regulations
- ▶ Constitution
- ▶ Email Telephone
- ▶ Lottery
- ▶ Managing for Results
- ▶ Great Hires
- ▶ Open Meeting Notices
- ▶ SAM II
- ▶ State Bids
- ▶ Statutes
- ▶ Tourism
- ▶ Unemployment

**MISSOURI TAX AMNESTY 2002**

**Missouri Tax Amnesty 2002**  
Avoid interest and penalties on taxes.

**MISSOURI Lewis & Clark**

**Lewis & Clark in Missouri**  
Follow their footsteps. Follow the rivers.

**MISSOURI**  
Where the rivers run

**Missouri Tourism**  
Rediscover your Missouri

**Bob Holden, Governor**

**Get the News**  
Governor Holden calls for a Fair Share Budget Plan to Close Corporate Tax Loopholes (09/12/02)

**Holden Establishes Missouri Security Council**  
(09/11/02)

**Statement Re: Orange Alert**

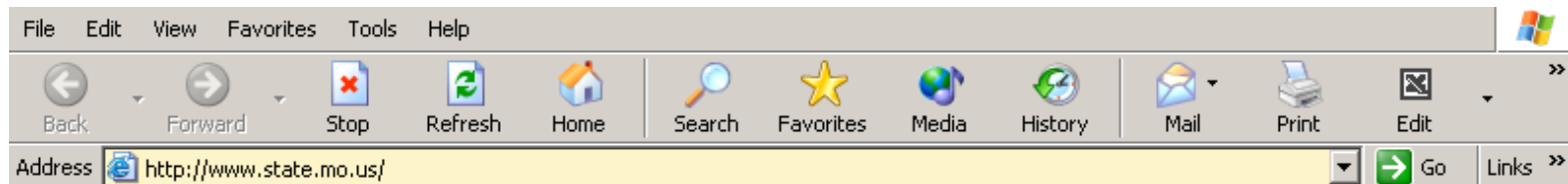
**Features & Updates**

- 9/11 Anniversary - Psychological Effects
- 2001-2002 Official Manual (Blue Book)
- Missouri Veterans Commission
- State Employee Health News - 2003 Insurance Contracts

Internet



# Accessing SAM II from the State Home Page



Thur, 12 Sept 2002

- ▶ Boards and Commissions
- ▶ Code of State Regulations
- ▶ Constitution
- ▶ Email / Telephone
- ▶ Lottery
- ▶ Managing for Results
- ▶ Great Hires
- ▶ Open Meeting Notices
- ▶ SAM II
- ▶ State Bids



**Missouri Tax Amnesty 2002**  
Avoid interest and penalties on taxes.



**Lewis & Clark in Missouri**  
Follow their footsteps. Follow the rivers.



**Missouri Tot Rediscover Missouri**



## Features & Updates

2004 Anniversary: Developmental Effects



# Choose Deductions and Benefits

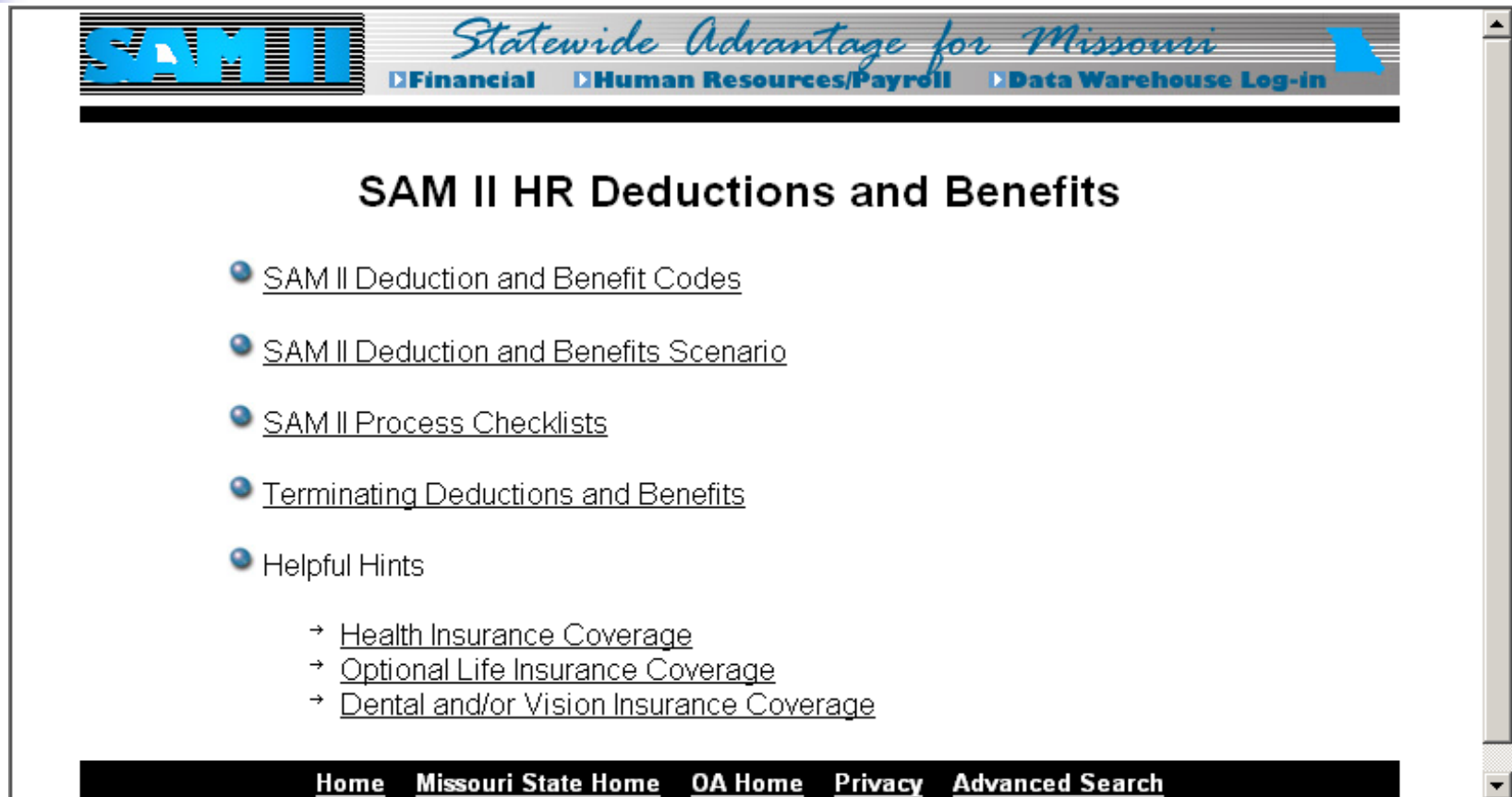


## SAM II HR Policies and Procedures

- [Deductions and Benefits](#)
- [HR Policies and Procedures](#)
- [SAM II Forms](#)
  - [Forms Management Electronic Forms](#)
  - [Supplemental Check - Check Cancellation Request Form](#)
- [Tips and Tricks for Using Folio](#)

[Home](#)   [Missouri State Home](#)   [OA Home](#)   [Privacy](#)   [Advanced Search](#)

# Choose SAM II Process Checklists



The screenshot displays the SAM II website interface. At the top, there is a header bar with the SAM II logo on the left, the text "Statewide Advantage for Missouri" in the center, and navigation links for "Financial", "Human Resources/Payroll", and "Data Warehouse Log-in" on the right. Below the header, the main content area is titled "SAM II HR Deductions and Benefits". Under this title, there is a list of links, each preceded by a blue circular icon. The links are: "SAM II Deduction and Benefit Codes", "SAM II Deduction and Benefits Scenario", "SAM II Process Checklists", "Terminating Deductions and Benefits", and "Helpful Hints". The "Helpful Hints" link is expanded, showing three sub-links: "Health Insurance Coverage", "Optional Life Insurance Coverage", and "Dental and/or Vision Insurance Coverage". At the bottom of the page, there is a black footer bar with white text links: "Home", "Missouri State Home", "OA Home", "Privacy", and "Advanced Search".

**SAM II** Statewide Advantage for Missouri  
Financial Human Resources/Payroll Data Warehouse Log-in

## SAM II HR Deductions and Benefits

- [SAM II Deduction and Benefit Codes](#)
- [SAM II Deduction and Benefits Scenario](#)
- [SAM II Process Checklists](#)
- [Terminating Deductions and Benefits](#)
- [Helpful Hints](#)
  - [Health Insurance Coverage](#)
  - [Optional Life Insurance Coverage](#)
  - [Dental and/or Vision Insurance Coverage](#)

Home Missouri State Home OA Home Privacy Advanced Search



## SAM II HR Process Checklists

SAM II Checklists have been developed to help guide end-users in establishing a position, hiring a new employee, rehiring a new employee, terminating an employee, and making time and leave entries on an employee. The following checklists are not meant to replace Policies and Procedures or the Training Manuals, but were developed as a supplement.

- Establishing a Position
- Hiring a New Employee
- Rehiring an Employee Within the Same Agency and Organization
- Rehiring an Employee from Same Agency, Different Organization
- Rehiring an Employee from Different Agency and Organization
- Terminating Employees
- Time and Leave Entry

- 
- 
- Questions??